# WIN-PAK PRO

**The Complete Access Control Software**

# Quick Reference Guide

TD0074 rev. 0701

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# Contents

Introduction .......... 8

Installation .......... 8
- Operating System .......... 8
- Hardware Requirements .......... 9
- WIN-PAK PRO Installation .......... 12
- First Login .......... 23
- Licensing and Registration .......... 24

User Overview .......... 26
- Title Bar and Menu Bar .......... 26
- Toolbar Buttons .......... 26
- Menus .......... 28
- General Database Access .......... 30
- Right-Click Menus .......... 32
- Database Tree .......... 32

Programming .......... 33
- To Create an Account .......... 33
- To Edit a Panel .......... 33
- To Add a Time Zone .......... 34
- To Delete a Time Zone .......... 35
- To Add a Time Zone to a Panel .......... 35
- To Add a Card Holder .......... 36
- To Delete a Card Holder .......... 36
- To Add a Card .......... 37
- To Delete a Card .......... 38
- To Print a Badge .......... 38
- To Add an Access Level .......... 39

Operations .......... 40
- To Open an Alarm View .......... 40
- To Open a Floor Plan .......... 40
- To Open the Control Map .......... 42
- To Generate, View, Print or Export a Report .......... 43

Database Backup and Restore Utility .......... 44

# Introduction

This Operator Quick Reference Guide is intended to help with basic installation and day to day use of the WIN-PAK PRO system. It briefly describes the toolbar buttons and lists the toolbar menus and their commands.

In addition, it contains procedures for frequently performed tasks including adding a card holder, an access level and a time zone. It contains a brief section on the Floor Plan view and the Alarms view, and tells how to generate and print reports.

For additional information on these and other topics, please consult the WIN-PAK PRO User Guide, TD0076 (rev. 0701), found on the WIN-PAK PRO CD or visit the Northern Computers web site at www.nciaccess.com.

A printed version of the WIN-PAK PRO User Guide can be ordered from your Northern Computers representative.

# Installation

## Operating System

WIN-PAK PRO is a 32-bit application which is designed to run in Windows 2000 or NT 4.0 with clients operating in Windows 98.

# Hardware Requirements

## Minimum Requirement Configuration

This setup is sufficient for small systems with 1 to 10 readers, up to 250 cards, and 2 communication ports. While this is a good configuration for a workstation, it is not sufficient for use as a server.

Pentium II-233Mhz CPU
128 megabytes of RAM
2.1 gigabyte hard disk
2 serial communication ports
Tape backup drive
1 parallel port (badging to be done on workstation)
2 button mouse (PS2 mouse preferred)
15" SVGA color monitor (1024 x 768, 256 color)
Supported Operating Systems:
Microsoft Windows 2000 Professional, Server, Advanced Server with Service Pack 1 (which requires 256Mb RAM), Windows NT 4.0 Service Pack 6a, Windows 98 SE or Windows 95

## Recommended Configuration

This is the recommended hardware configuration for basic access control, including badging, for systems with 1 to 100 readers, up to 5,000 cards, and up to 8 communication ports. It can be used for a stand-alone system, a workstation or a server. Additional RAM will improve performance.

Pentium III-700Mhz CPU
256 megabytes of RAM
6 gigabyte SCSI hard disk
2 serial communication ports
8 gigabyte SCSI tape backup
1 parallel port (2 for badging)
17" 1024 x 768 true color monitor
2 button mouse (PS2 mouse preferred)
Operating Systems:
Microsoft Windows 2000 Professional, Server, Advanced Server with Service Pack 1, Windows NT 4.0 Service Pack 6a.

## Performance Configuration

This configuration is recommended for systems using more than 16 communication ports. It is suitable for systems using up to the system capacity for readers, up to 25,000 cards, and 64 communication ports. It is suitable for a stand-alone system or a server.

Pentium III-1Ghz CPU

512 megabytes of RAM

18 gigabyte, 10Krpm SCSI hard disk

2 serial communication ports

20 gigabyte SCSI tape backup

1 parallel port (badging to be done on workstation)

19" 1280 x 1024 true color monitor

2 button mouse (PS2 mouse preferred)

Supported Operating Systems:

Microsoft Windows 2000 Professional, Server,
Advanced Server with Service Pack 1,
Windows NT 4.0 Service Pack 6a

## System Setup

### Stand-alone Systems

BEFORE installing WIN-PAK PRO for the first time ensure that the following conditions are met:

- Install Windows 2000 SP1, NT 4.0 with Service Pack 6a.
- Disable all energy management from both the BIOS and Operating System, as this can adversely affect the installation and operation of WIN-PAK PRO.
- Install a video capture card or digital camera on the PC that will serve as the badging workstation.
- Install printer drivers.
- Internet Explorer (IE) 5.5 is required for WIN-PAK PRO to work properly. If an older version than IE 5.50.4134.0600 is already installed, WIN-PAK PRO will install IE 5.5.

**NOTE:** Some software applications may not function properly on different versions of IE.

- Before beginning installation, make a note of the CD Key inside the cover of this manual. You will need this number during installation and when contacting Northern Computers regarding the software.
- Read the text files on the WIN-PAK PRO CD and any release notes that are shipped with the software. Additional installation information may be contained therein.
- TCP/IP protocol must be installed for the MSDE to work properly. A network card doesn't have to be installed. Use Microsoft Loopback adaptor or Dialup adapter, depending on the OS used.
- For NT based systems after any hardware/software changes (TCP/IP), run/install SP6a to ensure the operating system is properly configured.

### Networked Systems

BEFORE installing WIN-PAK PRO, ensure that conditions listed under Stand-alone Systems and the following listed conditions are met.

- Install network cards on PCs that are used in a networked system. (Any standard Windows-compatible network card can be used.)
- Ensure that machine names use only alphanumeric characters without spaces, and that the first character is always alpha (i.e. standard UNC connections).
- Ensure that networked computers are communicating with one another. The workstations need to be electronically visible to each other. If the computers can communicate, you can ping both ways: client-to-server and vice-versa. Any firewalls, proxies, routers, etc. between workstations could cause problems, unless a clear, unrestricted, permanent path can be established.

### Upgrades

If you are upgrading from a beta or earlier release version of WIN-PAK PRO, or migrating from WIN-PAK 2.0 or 1.x, make a backup copy of your database files. Also make backup copies of floor plan backgrounds, card holder photos, and signatures. When upgrading from older versions of WIN-PAK], compact and repair the database. This will reduce the existing database size, which increases the amount of free space and shortens the upgrade time.

If migrating from WIN-PAK 1, refer to the release notes included on the CD.

Verify that the amount of free space on the drive where the database exists is either 5 gigabytes or 2.5 times the current size of the WIN-PAK database. When prompted by the installation program, choose "update automatic".

All workstations must also be upgraded. All UIs/Servers must be running the same release build number.

## WIN-PAK PRO Installation

There are several types of installations available when setting up WIN-PAK PRO:

### Complete Installation

Select **Complete** installation when setting up a stand-alone system [an access control system installed on one computer], or if you are installing the Database Server for a networked system.

### Database Server Only

Select **Database Server Only** installation when installing on a networked system, with only the Database Server located on a separate PC.

### User Interface Only

Select **User Interface Only** installation when you are installing a workstation on a networked system.

### User Interface and Comm Server

Select **User Interface and Comm Server** installation when you are installing the communication server on a networked system and the PC may also be used as a workstation.

### Communication Server Only

Select the **Comm Server Only** installation when you are installing the communication server on a networked system.

**NOTE:** To optimize resources in high use systems, use the System Manager to disable unused system modules (e.g. the Guard Tour Server or the Muster Server).

## Installation Procedure

WIN-PAK PRO software is distributed on an autorun CD, along with the CD release notes, and other technical documents. This procedure describes the Complete Installation option. The User Interface Only option is described later. The procedure is the same for both up to Step 6, where the user is given the option of choosing which type of installation is desired.

**NOTE:** During installation, you may be asked if you want to overwrite existing files. Keep your existing .dll files. Whenever asked "Do you want to keep this file?", click **Yes**.

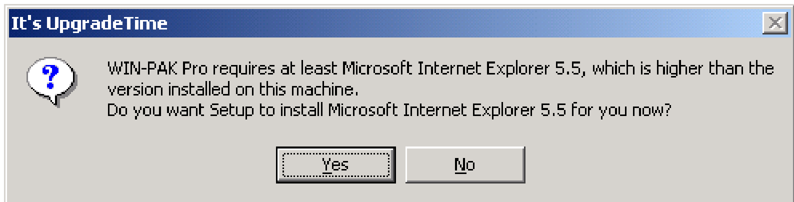
Depending on the computer and operating system, one or more screens displayed in this procedure may or may not appear.

Allow approximately 45 minutes for a first-time [not upgrade] installation. Click continue to initiate installation. Or, navigate to the WIN-PAK PRO directory on the CD and select the Setup executable. The WIN-PAK logo screen will appear temporarily until the initial Welcome screen appears.

1 Exit any Windows programs that may be running. Insert the WIN-PAK PRO CD into the CD drive. An installation browser opens. If the browser does not open, run the **Demo32.exe** file from the CD.

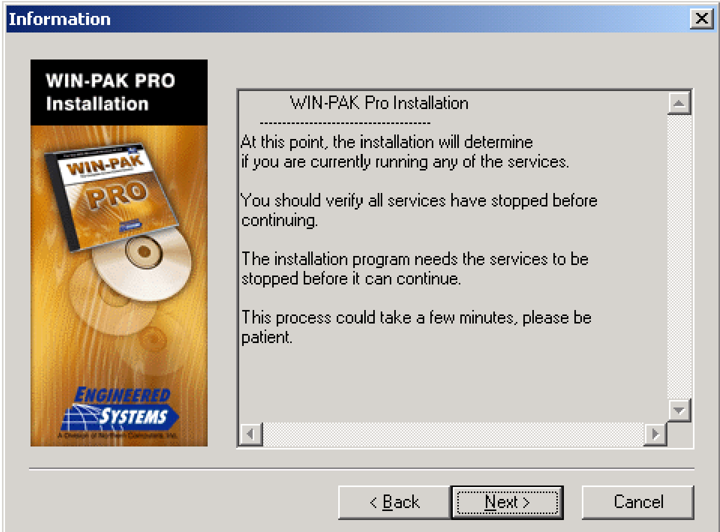
The first installation screen will appear. Navigate through the initial installation screens and select **Install WIN-PAK PRO**.

If an older version than IE 5.50.4134.0600 is installed, the WIN-PAK program will prompt the operator to upgrade (first illustration below). Click **Yes**, to upgrade. If the correct version of IE is detected, the first Welcome screen to WIN-PAK PRO (second illustration below) will appear.

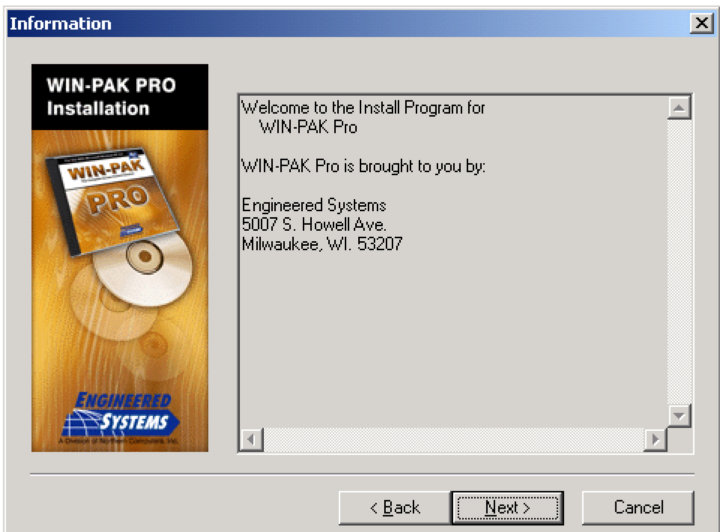




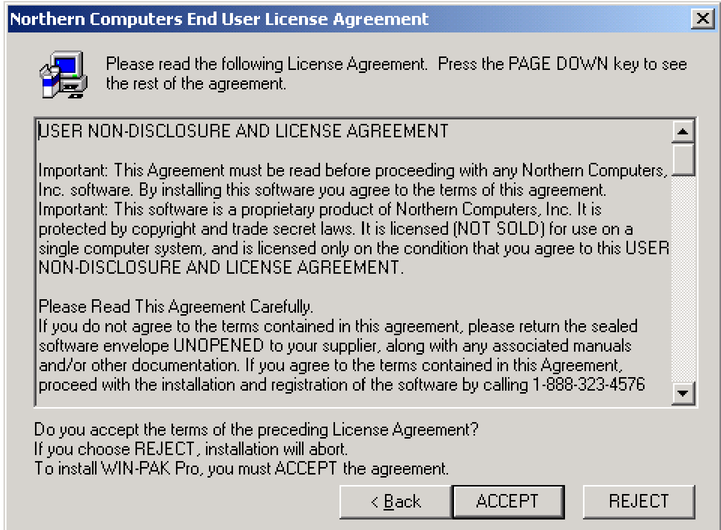
2 Click **Next** to advance to the next screen in the setup process. The Information screen is displayed (next illustration) while the program verifies that all the services are stopped.



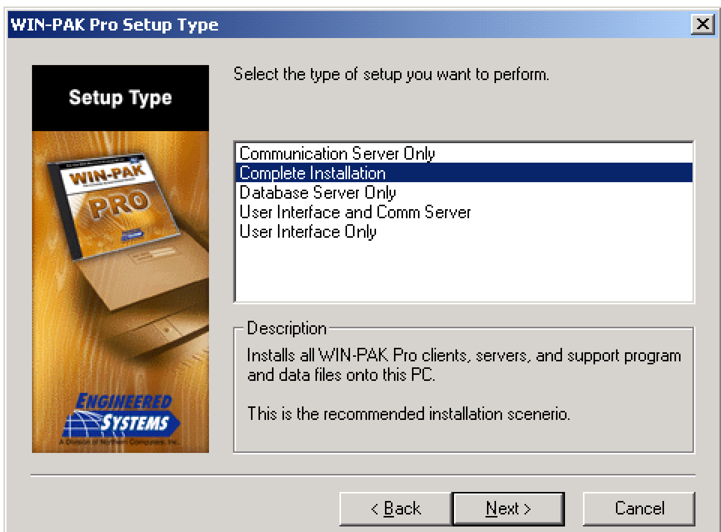

3 Click **Next** to continue installation. The second Welcome screen will be displayed:




4 Click **Next** and the User License Agreement window is displayed (next illustration).



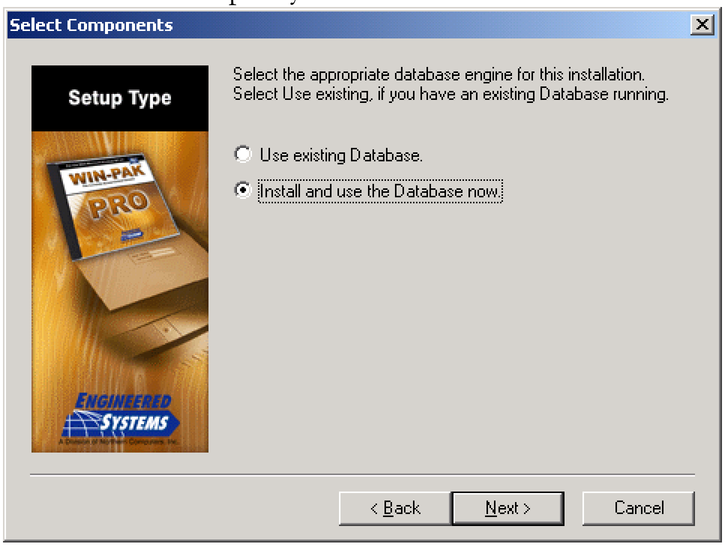

5 Click **Accept** to acknowledge that you understand and agree to the terms. The Setup Type screen will appear, from which the operator can select the type of setup (or installation) desired.




6 For the purpose of illustrating the Complete Installation option, select **Complete Installation** then click **Next** to continue. The Destination Location screen will appear (next illustration).

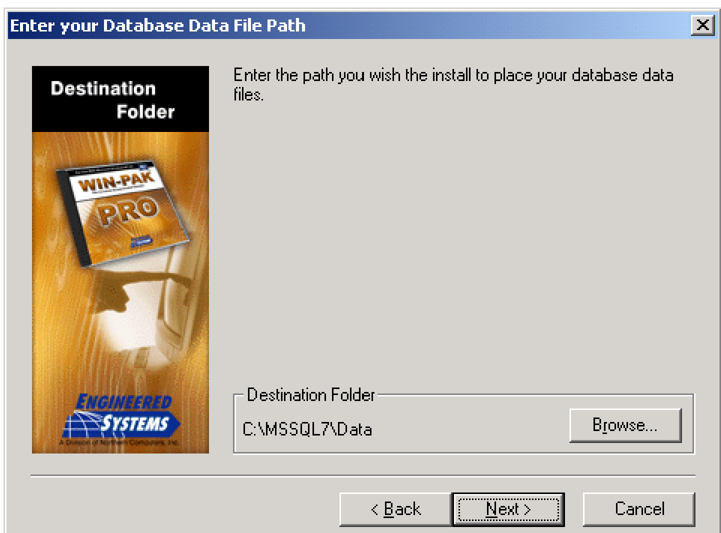
**NOTE:** Further on, the User Interface Only option is described in the "Installing User Interface Only" section. If it is desired to install this option, choose **User Interface Only** and refer to that section.


7 Click **Next** to accept the default location or click **Browse** and specify a different location.




8 Select **Use existing Database** if you have an existing database running, then proceed to step 10, "Database Data File Path" selection. Otherwise, select **Install and use the Database now**. Continue with installation type (next illustration).


9 Select the WIN-PAK version and database combination that applies to your system and click next. The existing database files will be renamed to WINPAKOLD and new WINPAKPRO database files are created.

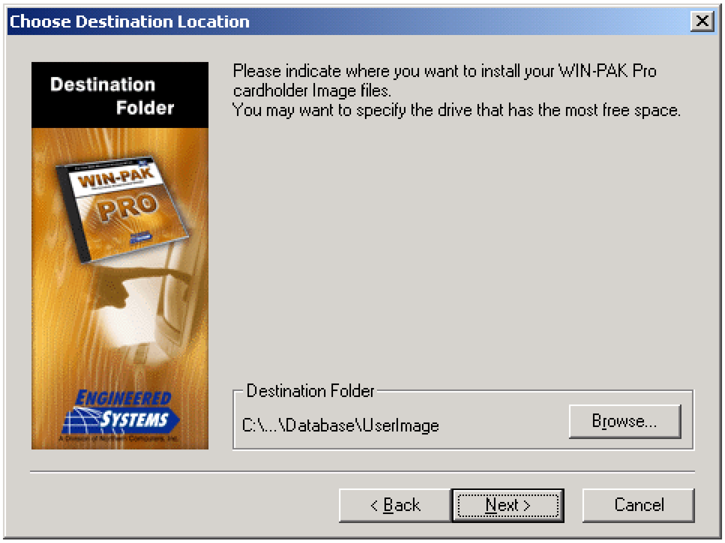



10 Click **Next** to accept the default location for the database files, or click **Browse** and specify a different location.

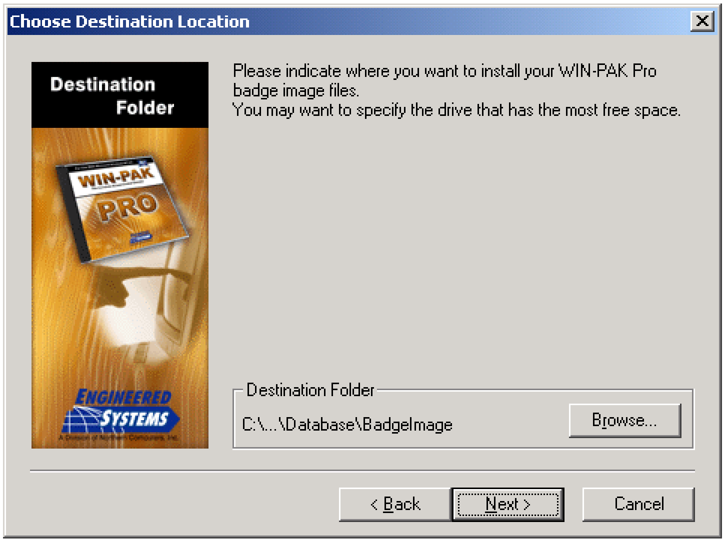
**NOTE:** In certain applications it may be preferable to place the database files on a different drive partition to protect them from operating system failure, or to place them on a separate hard drive to isolate them from the database server. Refer to the "Limits and Capacities" section of Chapter 9.

**NOTE:** It is recommended to install the database file on the same computer as the database server in order to benefit from the WIN-PAK PRO backup and restore utility.

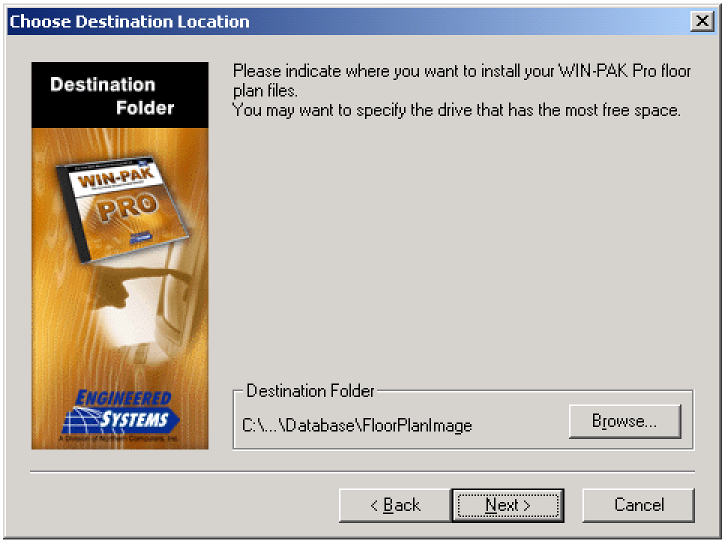
**NOTE:** The next three installation screens will allow the installer to define destination of specific database files.



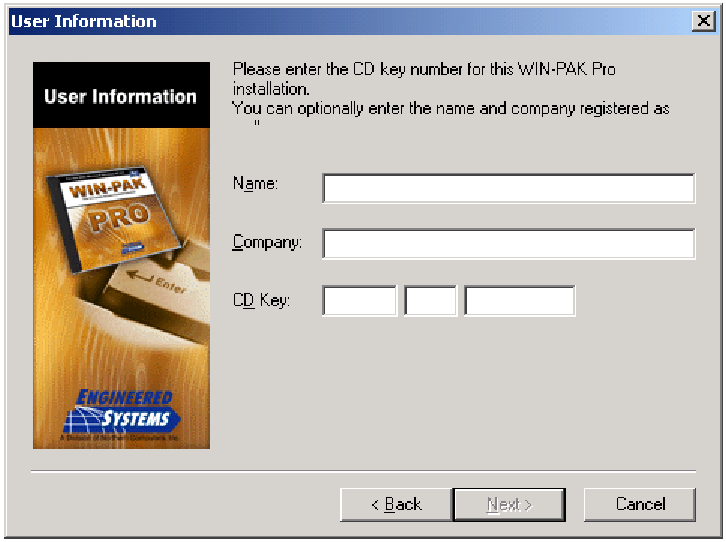

11 Click **Next** to accept the default location for the cardholder image files, or click **Browse** and specify a different location.




12 Click **Next** to accept the default location for the badge image files, or click **Browse** and specify a different location.

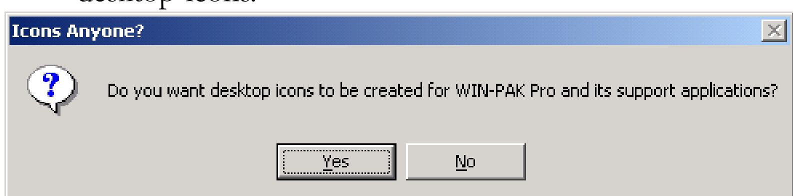



13 Click **Next** to accept the default location for the floor plan files, or click **Browse** and specify a different location. The User Information screen will appear (next illustration).




14 Fill in the User Information, then click **Next** to continue. The Name and CD Key windows must be filled in. The Company window is optional. The CD Key number is located on inside front cover of the WIN-PAK PRO Quick Reference Guide.

After finishing the User Information screen, the Icons Anyone? screen appears querying the operator about desktop icons.




15 Click **Yes** or **No** to install desktop icons or not. The MSDE database will be installed. The installation will take several minutes.

Afterward, the Select Components screen will appear (next illustration), from which the operator will choose whether to connect the database engine to the database file automatically or manually.

**NOTE:** Unless you are a software expert, it is highly recommended to choose the automatic installation option.


16 Select the database installation mode. [See previous NOTE.] Then click **Next** to continue.

The Question screen (next illustration) will appear, querying the operator whether to stop the database engine in order to continue the installation.


17 Click **Yes** to continue the installation.

18 After the installation is complete, the Setup Complete window will be displayed. Click **Finish** to complete the installation process and restart the computer.

# First Log In

All services should be running, but if not, double-click the WIN-PAK PRO Services icon and start all services.

Double-click the WIN-PAK PRO User Interface icon. The User Interface opens and the Connect to Server window is displayed:


Enter Admin as the default operator **Name**.

**NOTE:** No password is required for the initial log in, but you should add a password in order to insure the security of your system.

# Licensing and Registration

WIN-PAK PRO has a 30-day initial license period. For evaluation purposes, the software can be installed and used for up to 30 days without registration. At the end of the 30-day period, the initial license expires and is invalidated.

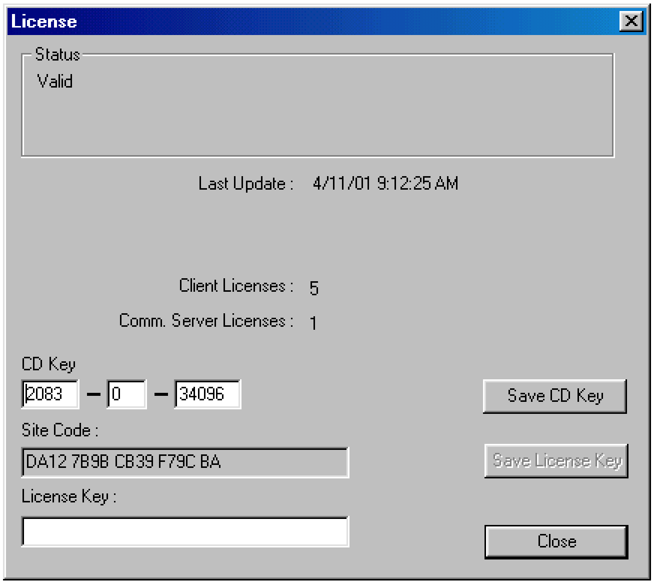
Once the license expires, only the Help menu is accessible until the software is registered and a valid license restored.

WIN-PAK PRO software has a CD Key found inside the cover of the user guide. Make a note of this number.

## Registering Software

Before beginning software registration, select the **License** option from the WIN-PAK PRO Help menu.

When the License window is displayed, note the **Site Code**. This is a unique number that identifies your computer.

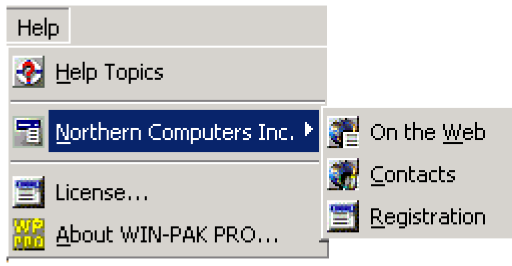


## Registering Software Online

You can register your WIN-PAK PRO software online by visiting the Northern Computers, Inc. web site at:

www.nciaccess.com/Custserv.nsf/PRO?OpenForm

Or, select **Registration** from the Northern Computers Inc. option on the WIN-PAK PRO Help menu. Internet Explorer will open at the registration site.




## Fax Registration

You can print out the registration form on your software CD and FAX it to Northern Computers at the number indicated on the form.

## Call-in Registration

Call Northern Computers Customer Service at 800-360-6067.

Be prepared to give the Customer Service Representative both the **CD Key** and the **Site Code**.

You will be given a Site Key. Enter this number in the **Site Key** field, activating the license for your software.

The number of clients and number of servers licensed for your system is now displayed in the License dialog. A new Site Code appears in the Site Code field.

## License Files

The encryption software writes files to your hard drive as part of the licensing. You must take care not to move or damage these files, or your license will be invalidated and you will not be able to access your system.

**CAUTION:** Using Norton Speed Disk can invalidate your license. Do not use Norton Speed Disk until you have made the following changes in its settings.

**NOTE:** The license files cannot be moved. There is no License Transfer utility.

### Norton Speed Disk Utility

Speed Disk is the defragmentation utility included in Symantec's Norton Utilities. If not installed as indicated below, this program moves system files, causing the loss of the license. To solve this problem:

1. Open Speed Disk and select **Options/Customize**, and then **Unmovable Files** from the File menu.
2. Specify that the *.ent, *.key, and *.rst files cannot be moved.
3. Save the new profile by selecting **Files/Options/ Optimization/Save.** Speed Disk can now be run without affecting your license files.

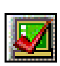
# User Overview

The WIN-PAK PRO user interface allows you to setup, monitor and maintain all aspects of your access control system.

## Title Bar and Menu Bar


Once a user is logged in, the title bar at the top of the screen displays the name of the operator and the license information. If the software has not been licensed, it gives the number of days left on the 30-day trial license.

## Toolbar Buttons



**Log In:** Logs the user out of WIN-PAK PRO (after a prompt), and reopens the log-in window, allowing the user to log in again, and reconnect to the database server.

**Select Account:** Calls the Account Select dialog, allowing an authorized operator to select an account.

**Dynamic Alarm View and Acknowledge:** Opens the Alarm View window, from which incoming alarms can be viewed, acknowledged, and cleared.

**View Events:** Opens the Events View window, which displays current system activity in real-time.

**Control Map:** Opens the Control Map in order to control devices. Also provides an alternate means of acknowledging and clearing alarms.

**Run Command File:** Calls the Run a Command File dialog, allowing the user to run text files containing device instructions stored in the Command Files database.

**Open Floor Plan:** Opens the Floor Plan database window, allowing the operator to open selected floor plans.

**Locate Last Card Holder/Card Holder Transaction:** Opens the Locate dialog, allowing the operator to search [by card holder name or card number] for the last time and place a card was used.

**Card:** Opens the main Card database window, allowing the operator to search and sort the card list and to add, edit, or delete cards.

**Card Holder Database:** Opens the Card Holder database window, allowing the operator to search and sort the cardholder list and to add, and to edit, or delete card holders.

**Run Reports:** Opens the Reports database window, allowing the user to generate, view, and print reports.

**Help Topics:** Opens the Help menu, providing access to online help files.

**Log Out:** Logs the operator out of the user interface and logs the client out of all servers.

# Menus

The following menus and menu options are available from the main WIN-PAK PRO window:

## File Menu

Log In
Log Out
Configure Badge Printer
Reports
Workstation Defaults
System Defaults
Database Maintenance
Database Limits/Capacities
Exit

## View Menu

Select Language
Toolbar
Status Bar

## Account Menu

| | |
|---|---|
| Select | |
| Edit | |
| Configure | Badge Layout Utility |
| | Card Holder Tab Layout |
| | Note Field Template |

## Operations Menu

Locate
System Events
Events
Alarms
AutoCard Lookup
Live Monitor
Floor Plan
Control Map
Command File
Guard Tour
Tracking and Mustering

## Card Menu

Card
Card Holder
Access Level
Bulk Card Add
Bulk Card Delete

## System Menu

Operator
Operator Level
Workstation Defaults
System Defaults

## Reports Menu

Reports

## Configuration Menu

| | |
|---|---|
| Define | Access Areas<br>Tracking Areas<br>Control Areas |
| Device | Device Map<br>Abstract Device (ADV)<br>Action Group |
| Time Management | Time Zone<br>Schedule<br>Holiday Group<br>Daylight Saving Group |
| Quick-Start Wizard | |
| Card Holder | Configure AutoCard Lookup<br>Note Field Template<br>Card Holder Tab Layout |
| Badge | Configure Badge Printer<br>Badge Layout Utility<br>Badge DLL's |
| Select Language | |
| Translate | Available Languages<br>Dialogs<br>Menus<br>Other Text |
| Command File | |
| Guard Tour | |
| Floor Plan Definition | |

## Window Menu

Arrange Icons

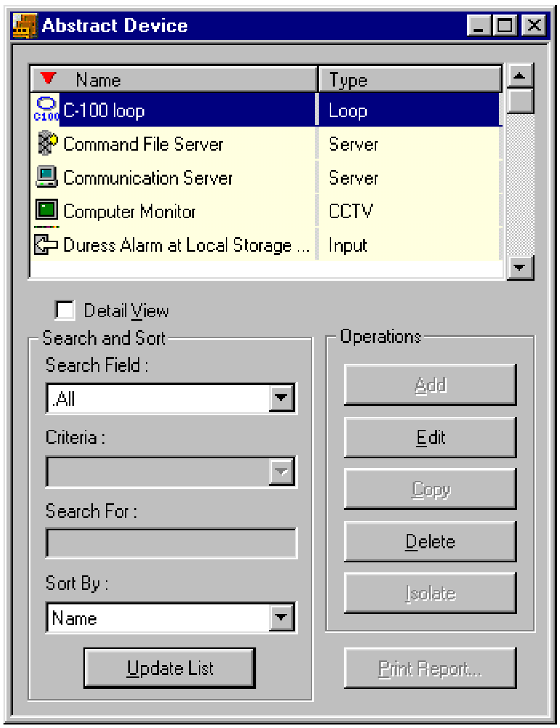
## Help Menu

| | |
|---|---|
| Help Topics | |
| Northern Computers, Inc. | On the Web<br>Contacts<br>Registration |
| License | |
| About WIN-PAK PRO | |

# General Database Access

Each of the WIN-PAK PRO databases are accessed through a main database window. It displays a list of records in the database, which can be searched and sorted. Records can be removed from the database by deleting them from the list in the main database window. A detail view opens from the main database window, displaying record details, and also allowing database records to be edited and (in most databases) added.

To close the main database window, click the close button in the window's upper right corner.




## Search and Sort Fields

Use these fields to choose the search characteristics to be applied to the records list.

**Search Field:** Select the name of the field you want to search.

**Criteria:** Choose one of the operators from this list. The available options vary depending on the database, but include *greater than, equal to*, or *less than.*

**Search For:** Type in a letter, word, phrase or numeric expression that you want to search for.

**Sort By:** This selection designates the order in which the search results will be displayed (e.g. cards can be displayed by card number or last name.)

**Update List:** This button initiates a search based on the information entered in the Search and Sort fields.

## Operations

**Edit:** Opens the Edit View window to the selected record, allowing the record to be changed.

**Add:** Opens a blank Record View window for entry of a new record.

**Delete:** Removes the selected record from the database. In the Card database, a confirmation dialog box appears if the Confirm Card Deletes option is selected in Workstation Defaults. Click **OK** to confirm.

**Copy:** Some databases (e.g. Badge Layouts and Action Groups) have a Copy function. Select a record and click the Copy button to make a duplicate which can be renamed and edited.

**Isolate:** Some databases (e.g. Time Zones) have an Isolate function, which is very helpful when you want to delete an item. WIN-PAK PRO will not delete an item that is in use.

Isolate allows you to view the usage and reassign elements without having to search through all the possible areas where the element might be in use. For example, in order to delete a time zone you must first remove it from any panels, access levels, cards, operators, ADVs or action groups where it is used.

Click **Isolate**, the Modify Usage (Isolate) window appears. Tabs indicate where the time zone is used and allow it to be removed from each instance. When this process is completed, click **OK** to return to the main database window. Now the time zone can be deleted by selecting it and clicking Delete.

### Print Report

Click the Print Report button to view and print or export a report on the current database. Generally, a filter dialog box opens first, allowing you to select settings for the report. Select Print Preview to review the report and Print to print the report or Export to create a delimited txt file of the report.

## Right-Click Menus

Right-click items in the WIN-PAK PRO User Interface to display item specific menus. For example, right-click a panel on the Device Map to open a menu which allows you to change the panel configuration, to isolate it or delete it from the Device Map.

## Database Tree

Several WIN-PAK PRO databases use *trees* to display information. The trees allow information to be organized into logical or geographical groups.

The tree can be collapsed so that only the top level information is displayed. By clicking on the plus signs (+), the tree structure can be expanded, one level at a time, to show all branches.

# Programming

## To Create an Account

WIN-PAK PRO supports multiple accounts. When setting up the access control system, create at least one account. Additional accounts can be added at any time. With multiple accounts, only those operators who are authorized for a give account can view or edit the card and card-holder databases for that account.

1 On the **Account Menu**, click **Edit**. The Account Record window appears.

2 Enter the **Account Name**. This is the only required information.

3 Enter any desired information in the numbered **Data Fields**. If desired, use the **Edit Text** utility to name these fields.

4 Click **OK**.

**NOTE:** For multiple accounts, repeat this procedure for each account.

## To Edit a Panel

The panel configuration contains a great deal of information about the setup of your access control system. This information can be edited by locating the panel on the Device Map, right-clicking the panel, and then selecting **Configure** and the desired tab. When you have finished editing the information click **Finish** to save your entries, or **Cancel** to exit without saving.

Panel definitions are added to the **Device Map**.

1 In the **Configuration** menu point to **Device**, and then click **Device Map**. The Device window appears.

2 Click the plus signs (+) to open branches, until the panel of your choice is displayed.

3 Right-click the panel that you are editing, and then select **Configure**. The Panel Configuration window opens.

4 Select the tab of your choice and then make the desired changes.

5 Click **OK** to save your changes and close the Panel Configuration window. Or click **Cancel** to exit without saving your changes.

**NOTE:** Even when you click **Cancel** some changes are retained. Any ADVs you edited keep their changes and any ADVs you deleted are not restored.

## To Add a Time Zone

1 On the **Configuration** menu, point to **Time Management**, and then click **Time Zone**. From the **Time Zone** database window select a time zone and click **Edit** or click **Add**. The detail window becomes active, allowing you to edit an existing time zone or define a time zone.

2 For a new time zone, enter a name and a brief description, then use your mouse to drag the time line to the desired hours.

3 The Snap Time option allows you to set the time to snap to increments of 60, 30, 15 or 0 minutes. Selecting 0 minutes allows the time to be set to the minute.

4 Once you have entered a range of time for Monday, you can copy it to the other weekdays by clicking **Copy Monday to Weekdays**. Or you can create the time line for each day separately.

5 Create a time range for Saturday, Sunday and Holidays (if desired).

6 Click **OK** to save your time zone. Clicking **Cancel** returns to the main database window without saving your entries.

## To Delete a Time Zone

1 Use the **Isolate** dialog to change Operators, Panels, Access Levels, Cards, Action Groups and ADVs that use the time zone you are going to delete.

2 In the **Time Zone** database window, highlight the time zone you want to delete, then click **Delete**. If you are sure you want to delete the time zone, click **OK** when the confirmation dialog box prompts you.

## To Add a Time Zone to a Panel

To have the desired effect, a time zone may need to be added to the panels, access levels, ADVs and Action Groups.

1 On the **Configuration** menu, point to **Device**, and then click **Device Map**. The Device window appears.

3 Click the plus sign (+) to display the panel of your choice. Right-click the panel that you are editing, click **Configure** and then click the **Time Zone** tab.

3 In the Available Time Zones list (upper pane), double-click the time zone to be added. The added time zone(s) appear in the Selected Time Zones list.

4 If the new time zone is to be applied to inputs, outputs, or groups, click those tabs and select the new time zone from the list of available time zones.

5 When you have completed all changes, click **OK** to save them.

## To Add a Card Holder

1 Select **Card** menu, click **Card Holder**. The Card Holder window appears.

2. Click **Add**. The Card Holder Record window opens to the Name Information tab.

3 Enter the card holders first and last names in the respective fields. This is the minimum information required. Add any optional information on the appropriate tabs.

4 To assign a card to the card holder, click the **Cards** tab, and then click **Attach**. The Select dialog box appears.

5 Click **Find** to display a list of available cards. If there are no cards available, click **Add** and follow the **To Add A Card** procedure.

6 From the list, select the card that you want to attach to the card holder, and then click **OK**. The selected card is now assigned to the card holder, along with the access level for that card.

7 To Add a Card Holder Photo or Signature**,** click the **Card Biometrics** tab and click the Import or Capture buttons for either photos or signatures.

## To Delete a Card Holder

1 Select **Card** menu, click **Card Holder**. The Card Holder window appears.

2 Select the desired card holder.

3 Click **Delete**.

4 You will be prompted to confirm the card delete. If the Card Holder is assigned cards, photos and/or signatures you will also be informed of a Card Holder Dependency Conflict. From the dialog box you can choose to either delete the cards and images or detach them from the card holder.

5 When asked to confirm the deletion, click **OK** to delete the card holder or click **Cancel** to retain the card holder.

## To Add a Card

1 On the **Card** menu, click **Card**. The Card window appears.

2 Click **Add**. The Card Record window appears displaying the Card Properties tab.

3 In the **Card Number** box, enter the card number.

4 Click the pull-down arrow in the **Access Level** box, and select an access level for the card. Custom Access Levels can be created. See "Custom Access Levels" in your User Guide for further information.

5 If your system requires a PIN (personal identification number), enter it in the **PIN** field. A PIN can be added to the card later.

6 Set the card status and select any other options you want.

7 To associate a badge layout with the card, click the **Badge** tab. Click the pull-down arrow in the **Badge Front** and **Badge Back** boxes and select a front and back layout for the badge.

8 When you have finished defining the card, click **OK** to save it. Or, click **Cancel** to return to the **Card** window without saving the new card.

## To Delete a Card

1. On the **Card** menu, click **Card**. The Card window appears.
2. Select the card you want to delete from the card database list.
3. Click **Delete**.
4. If asked to confirm the delete, click **Yes** to delete the card or click **No** to cancel the delete.

**NOTE:** By default, you will be asked to confirm card deletes. However, this setting can be changed in work station defaults so that cards can be deleted without confirmation. To change this setting, go to the **System** menu, click **Workstation Defaults**, and then select the **Defaults** tab. Select the **Confirm Card Deletes** check box to turn this feature on; deselect it to turn it off.

## To Print a Badge

1. Select the **Card** menu, click **Card**. The Card window appears.
2. From the list of cards, select a card or range of cards, and then click **Print Report**. The Select Printed Output window appears.
3. Click **Print Cards**.

**NOTE:** The Print Badge Preview allows you to view the badges before printing. If you are printing a batch of cards, use the **Next** and **Previous** buttons to scroll through the preview.

4. Click **Print**.

## To Add an Access Level

1 Select the **Card** menu, click **Access Levels**. The Access Level window appears.

2 Click **Add**. The Define Access Level window appears.

3 In the **Name** box, enter a name for the Access Level [required]. Use up to 30 characters.

4 In the **Description** box, enter a description of the Access Level [optional]. Use up to 60 characters.

5 Click **OK**. The new access level is added to the list, but it has no access rights to any entrances. You must now configure the access level.

6 Use the **Available Accounts** and **Selected Accounts** fields to select which accounts will have access to the newly created Access Level.

6 Right-click on an **Access Area** branch, then click **Configure**. The Configure Area Access window appears.

7 To allow access to all doors in the area, select **Set Access for all entrances in this area.**

8 Click the pull-down arrow in the **Time Zone** box, and select a time zone from the list.

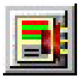
9 Click **OK.**

10 In the **Access Level** window, right-click individual entrances on the branch to customize the settings as necessary. Continue this procedure until the access level has the required configuration.

**NOTE:** It is easy to tell at a glance what areas are included in a given access level. Select a level from the list in the left pane. The branches of the Access Areas are color-coded for the selected level: red means no access to any doors in the area. Yellow means access to some entrances in this area. Green means access to all entrances in this area during the assigned time zone. Click a branch to view the entrances which are also color coded and have a time zone notation.

# Operations

## To Open an Alarm View



1 Click **Alarms** from the **Operations** menu to open the **Alarms** view.

2 You can open multiple alarm views by repeating this procedure.

Colors of incoming messages indicate the type of event. Red indicates an *alarm*, green indicates *normal* and yellow is a *trouble* condition.

Selecting the **Details** check box opens the Alarm Details screen showing details of the state changes indicated by the counter and allowing a note to be written for that alarm.

### Command Buttons

**Ack:** To acknowledge an alarm, select it from the list of incoming alarms and click the **Ack** button.

**Clear:** To clear one or more transactions, select them from the list of acknowledged transactions and click the **Clear** button.

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**NOTE:** If an alarm cannot be cleared, it may be due to a setting in Workstation Defaults that requires an alarm to return to normal before clearing.

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**Freeze:** To temporarily stop the display of incoming messages, click the **Freeze** button. [The button changes to **Release**.] This stops the screen from scrolling as new information appears. To release the screen, click the **Release** button.

**Close:** To exit the **Alarms** view, click the **Close** button.

### Alarms View Right-Click Menus

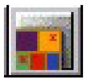
Right-click a message in the **Alarms** view and a control menu appears. The list of available commands depends on the type of alarm selected.

### To Add a Note

1 Select an alarm, and then click the **Add Note** button to open the **Add/Edit Operators Note** dialog.

2 Type the message and then click **OK**. These notes are included in history and can be printed with the History report.

## To Open a Floor Plan



1 Click **Floor Plan** from the **Operations** menu to open the **Open Floor Plan** dialog.

2 Select a floor plan and click the **OK** button. The selected floor plan opens in a separate window, identified by a title bar.

3 To control devices from the floor plan, right-click an ADV to open the control menu, then click the command. The commands available depend on the type of object you select.

### To Enlarge or Reduce the Floor Plan View

1 Right-click in an area of the floor plan [not an ADV], then click **Zoom**. Select a preset percentage of enlargement or reduction or **Fit window.**

2 If you prefer, select custom, and then enter a percentage value. The floor plan is automatically enlarged or reduced within the viewing window.

3 Once the floor plan has been enlarged to the degree that scroll bars appear, you can right-click the floor plan, and then click **Show View**. A smaller window opens inside the floor plan viewing window, showing the location of the enlarged detail on the total floor plan.

# To Open the Control Map

1 From the **Operations** menu, click **Control Map**. The **Control Map** window opens. Expand the tree by clicking the plus signs (+) to display the devices that you want to control.

2 Right-click any device to open its control menu, and then click the desired command.

## Status Symbols

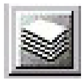
One of three status symbols may appear before an ADV icon on the Control Map screen.

- Red square = alarm
- Green circle = normal
- Yellow triangle = trouble
- Purple question = unknown

The status symbols will darken after their respective conditions have been acknowledged and cleared. A forbidden symbol overlayed over a status symbol indicates that the corresponding point is shunted.

Placing the mouse over the status symbols will bring up a textual description of the status for each ADV.

## To Generate, View, Print or Export a Report



Some reports are account sensitive. Card and card holder reports are generated by account. To generate these reports, simply select the account of your choice and then proceed to select and filter the report, as outlined below.

1 On the **Reports** menu, click **Reports**.

2 From the database record list, select the report you want to generate, and then click **Report Options**. A detail window appears. Some reports have a variety of filters and sort options. Select the options you want.

3 Click **Estim. Pages** to find out the about how long the printed report is.

4 After selecting the options you want, click **Print Preview** to view the report.

5 Use the **Zoom** tool to enlarge the page view. Use the **Next Page** and **Previous Page** buttons to scroll through a multiple page report.

6 To print the report, click **Print**. The Print window appears. This is a standard Windows print dialog box. Select the printer of your choice, the page range, and number of copies. You can make any other desired changes to your printer setup.

7 To export the report, click **Export File**. The Export File window appears. In the window set the Delimiter option and give the report a file name.

# Database Backup and Restore Utility

In the event of software or hardware problems, it is always a good idea to have a recent copy of your database files.

The WIN-PAK PRO Backup and Restore utility is a stand-alone application that allows the user [typically a database administrator] to create and modify a backup and restore plan.

Database copies made with the Backup and Restore utility can be used to restore your database after a failure has occurred.

The WIN-PAK PRO Backup and Restore utility allows for the creation of multiple scheduled backups, and for the restoration of the WIN-PAK PRO database, the archive database, and a temporary database which allows you to examine the restoration without affecting the current WIN-PAK PRO databases.

The WIN-PAK PRO Backup and Restore Utility is automatically installed when your WIN-PAK PRO System is installed. The utility is accessed from the WIN-PAK PRO Program group on your Start menu or an icon on your desktop. The WIN-PAK PRO Backup and Restore Utility is made up of three components: Backup, Schedule and Restore.

The Backup and Restore utility will only backup the WIN-PAK PRO hardware and history database information. Other data, such as badge images, signatures, badge and floor plan graphics are not backed up by this utility. This data is normally found in the WINPAKPRO\DATABASE folder with BadgeImage, FloorPlanImage and UserImage subfolders.

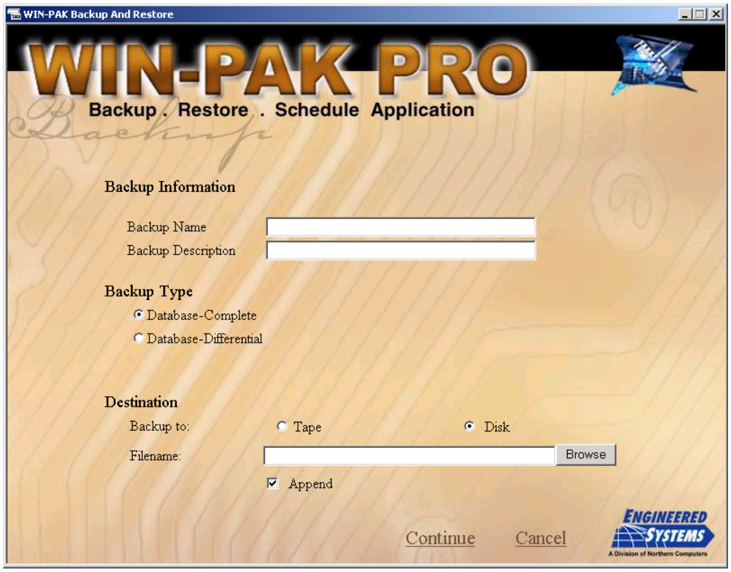
During the WIN-PAK PRO installation, prompts are provided to allow the installer to place these subfolders at other locations in your system. Therefore you may not find these subfolders in the WINPAKPRO folder. Backup of these data folders can be accom-plished using standard Windows backup or copying utilities. Both should be done at the same time to keep all information current.

## Backup

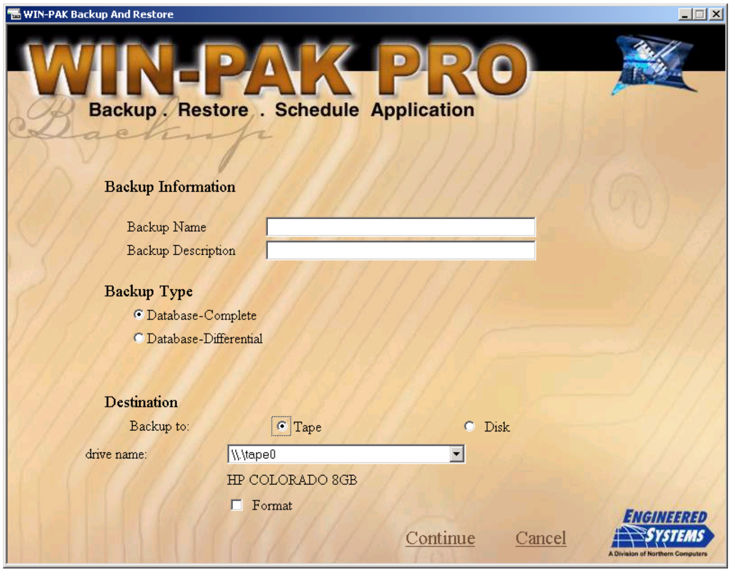
1 Select **Backup & Schedule** from the main Backup and Restore window to create a new backup.


2 When the Backup Information window is displayed, enter a unique Backup Name, as well as an (optional) Description.

3 Select a database **Backup Type**. Complete will make a complete backup and Differential will backup only the differences from the last complete, appended or differential backup.




4 Select a **Destination** and file name for the backup. If a tape drive is not installed on the computer you can not select Tape. If a tape drive is on the computer, then the option to format the tape is also given.



5 Click **Continue** to bring up the Scheduling window.


6 Select the **Schedule Type**. Run Once will prompt for the time and date.

Schedule to occur later will bring up Daily, Weekly and Monthly options.


Daily allows the back up to be run every so many days as defined from 1-999 day(s) at the specified time.

Weekly allows the back up to be run on a specified day of the week at a specified time.

Monthly allows the backup to be run on the selected the day of the month (1-31) or at regular monthly intervals.

## Schedule

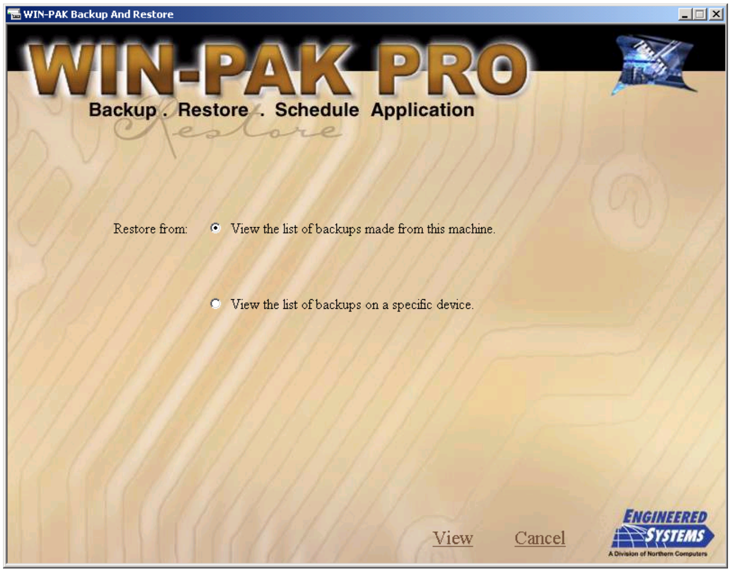
Schedules can be modified by selecting Modify Schedule from the main Backup and Restore Window. To open a list of currently-scheduled backups, highlight a backup in the main schedule list and click on modify. This will bring up the Schedule screens shown above. Modify the schedule and click Finish.

To remove a schedule, select the backup schedule and click **Delete**.

Click **Cancel** to return to the main Backup and Restore window.

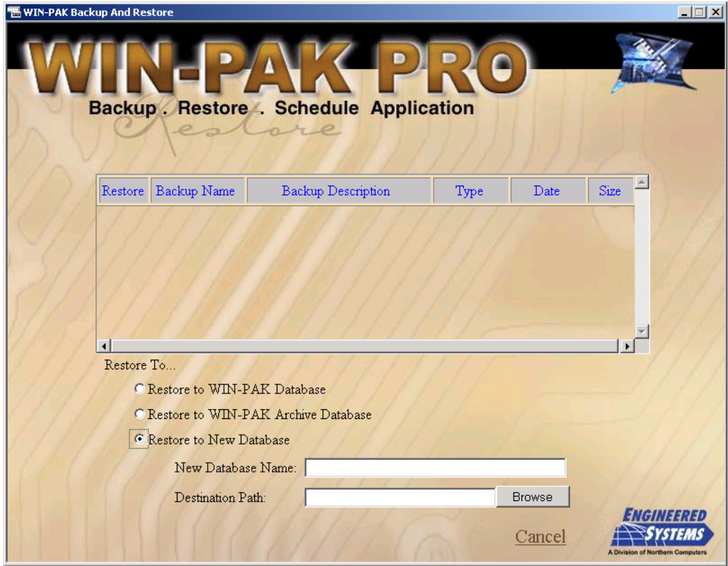
## Restore

1 Select **Restore from** the main Backup and Restore window to restore a backup. WIN-PAK PRO's database knows the locations that the backups were made on this machine. If the backup is to be recovered from a different location, then select the View list of backups on a specific device option and navigate to the desired location.




2 Once the appropriate backup file is selected, a viewer (next illustration) shows the contents of that backup. Select the backup file desired. If selecting a differential backup, the last complete backup is automatically selected, as that is required to complete the restore process.

**NOTE:** The WIN-PAK PRO database contains the listing displayed and file location as defined when the backup was made. When the "View the list of backups made from this manual" is selected, it is expecting to find the files where it last placed them. If the backup file is not found by the restore utility, it will prompt you to browse the computer to find it. The backup file must be located on the same (physical) computer that is performing the restore. Restoring across a network is not supported. If the backup has been moved to a different computer, it must be moved to the computer performing the restore.



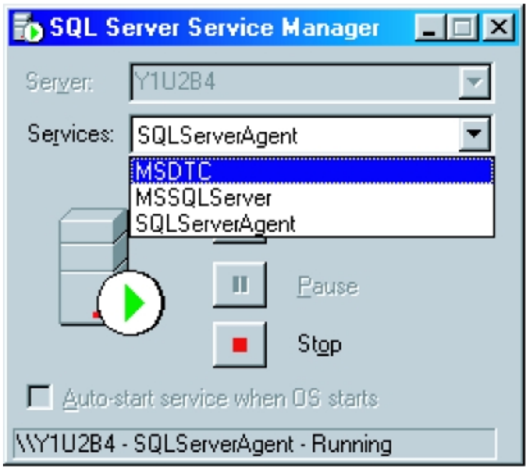

3 Use the **Restore** list to set the parameters for the backup. Restoring the WIN-PAK Database requires that the WIN-PAK PRO database services be turned off. The restoration process will not proceed if the services are running. Restoring to WIN-PAK Archive Database replaces the existing archive database and allows reports to be generated for the archive.

Restoring to New Database allows advanced users to view the database without adversely affecting the current or backup database.

4 Click **Restore** to continue. When finished, click **Cancel** or **Exit**.

**NOTE:** Scheduled backups run automatically as long as the MSSQLServerAgent components are running. By default these components are set to run when the operating system starts.

5 To check if MSSQLServerAgent components are running, double click on the icon (shown below) in the tray on the bottom of the Window.





**SQL Server Service Manager**

6 From the Services box, select **MSSQLServer**.

The message on the bottom of the SQL Server Service Manager windows will give you the computer name followed by "MSSQLServer-Running". Select the **SQLServerAgent**. The message on the bottom of the SQL Server Service Manager windows will give you the computer name followed by "SQLServerAgent-Running".

7 If MSSQLServerAgent components are not running, click on the **Start/Continue** button.

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